

| BUDGET SUMMARY<br>FOR LEGAL SERVICES<br>FISCAL YEAR 2003 - 2004 |                       |                 |           |                  |
|---|-----------------------|-----------------|-----------|------------------|
| INLAND COUNTIES LEGAL   |                       |                 |           |                  |
| EXPENDITURE CATEGORY  | Funding<br>Less Match | Match           |           | TOTAL            |
|   |                       | Cash            | In-Kind** |                  |
| 1. PERSONNEL  | 126,000               | 27,650          |           | 153,650 -        |
| 2. STAFF TRAVEL   | 3,500                 |                 |           | 3,500 -          |
| 3. STAFF TRAINING   | 2,500                 |                 |           | 2,500 -          |
| 4. EQUIPMENT  |                       |                 |           | -                |
| 5. CONSULTANTS  |                       |                 |           | -                |
| 6. FOOD COSTS   |                       |                 |           | 2,700 -          |
| 7. CONSUMABLE SUPPLIES  | 2,700                 |                 |           | 1,300 -          |
| 8. INSURANCE  | 1,300                 |                 |           | -                |
| 9. REPAIRS & MAINTENANCE  |                       |                 |           | 13,500 -         |
| 10. RENT/BUILDING SPACE   | 13,500                |                 |           | 6,500 -          |
| 11. UTILITIES   | 6,500                 |                 |           | -                |
| 12. VEHICLE OPERATIONS  |                       |                 |           | -                |
| 13. VOLUNTEER EXPENSES  |                       |                 |           | 5,000 -          |
| 14. OTHER   | 5,000                 |                 |           | 188,650 -        |
| <b>Total Expenditure</b>  | <b>161,000 -</b>      | <b>27,650 -</b> |           |                  |
| <b>Less Match</b>   |                       |                 |           | <b>27,650 -</b>  |
| Match Cash - CDEG - DAAS  |                       | 27,650          |           | -                |
| Match In-kind   |                       |                 |           | -                |
| <b>Less Funding - Program</b>                                   |                       |                 |           |                  |
| Non-Match Cash  |                       |                 |           | -                |
| Non-Match In-Kind   |                       |                 |           | -                |
| Realignment Funds   |                       |                 |           | 9,000 -          |
| Program Income  | 9,000                 |                 |           | -                |
| <b>TOTAL FUNDING REQUEST</b>                                    | <b>152,000 -</b>      |                 |           | <b>152,000 -</b> |

Date of Submission - April 15, 2003

PROVIDER NAME - Inland Counties Legal Services, Inc.

INITIAL BUDGET ☒REVISED BUDGET ☐

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|---|-----------------------|-----------------|-----------|------------------|
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| 3. STAFF TRAINING   | 2,500                 |                 |           | 2,500 -          |
| 4. EQUIPMENT  |                       |                 |           | -                |
| 5. CONSULTANTS  |                       |                 |           | -                |
| 6. FOOD COSTS   |                       |                 |           | 2,700 -          |
| 7. CONSUMABLE SUPPLIES  | 2,700                 |                 |           | 1,300 -          |
| 8. INSURANCE  | 1,300                 |                 |           | -                |
| 9. REPAIRS & MAINTENANCE  |                       |                 |           | 13,500 -         |
| 10. RENT/BUILDING SPACE   | 13,500                |                 |           | 6,500 -          |
| 11. UTILITIES   | 6,500                 |                 |           | -                |
| 12. VEHICLE OPERATIONS  |                       |                 |           | -                |
| 13. VOLUNTEER EXPENSES  |                       |                 |           | 5,000 -          |
| 14. OTHER   | 5,000                 |                 |           | 188,650 -        |
| <b>Total Expenditure</b>  | <b>161,000 -</b>      | <b>27,650 -</b> |           |                  |
| <b>Less Match</b>   |                       |                 |           |                  |
| Match Cash - CDBG - DAAS  |                       | 27,650          |           | 27,650 -         |
| Match In-kind   |                       |                 |           | -                |
| <b>Less Funding - Program</b>                                   |                       |                 |           |                  |
| Non-Match Cash  |                       |                 |           | -                |
| Non-Match In-Kind   |                       |                 |           | -                |
| Realignment Funds   |                       |                 |           | 9,000 -          |
| Program Income  | 9,000                 |                 |           | -                |
| <b>TOTAL FUNDING REQUEST</b>                                    | <b>152,000 -</b>      |                 |           | <b>152,000 -</b> |

Date of Submission - April 15, 2003

PROVIDER NAME - Inland Counties Legal Services, Inc.

INITIAL BUDGET

REVISED BUDGET

☒☐

# **Budget In-Kind Narrative** **FOR** **SUPPLEMENTAL SERVICES**

Provide information regarding specific in-kind to be used as match. Include site location, if applicable, descriptions, rates and other relevant information. The total should equal the amount of in-kind reported as match on your budget summary.

| Description*                      | Site/Location   | Rate         | Total In-Kind Match |
|-----------------------------------|-----------------|--------------|---------------------|
| <b>ACCOUNTING &amp; REPORTING</b> |                 |              |                     |
| Controller 2%                     | Exec. office    | \$6,367/mth. | \$ 1,550            |
| FC Bookkeeper 2.5%                | Exec. office    | 3,090/mth.   | 950                 |
| <b>PROGRAM ACTIVITIES</b>         |                 |              |                     |
| Managing Attorney 3%              | Victorville     | 5,644/mth.   | 2,000               |
| Managing Attorney 3%              | San Bernardino  | 5,821/mth.   | 2,000               |
| Attorney 15%                      | San Bernardino  | 3,000/mth.   | 5,400               |
| Attorney 3%                       | Rancho Cucamong | 3,000/mth.   | 1,800               |
| Paralegal 15%                     | San Bernardino  | 2,969/mth.   | 5,400               |
| Paralegal 10%                     | Rancho Cucamong | 2,438/mth.   | 2,900               |
| Paralegal 5%                      | Victorville     | 2,499/mth.   | 1,500               |
| Total Salaries                    |                 |              | 23,500              |
| Fringe Benefits                   |                 |              | 2,350               |
| Payroll Taxes                     |                 |              | 1,800               |
| Total In-Kind                     |                 |              | 27,650              |

(\*Identify type of in-kind: rent, volunteer svcs., etc.)

DATE OF SUBMISSION April 15, 2003

PROVIDER NAME Inland Counties Legal Services, Inc.

San Bernardino County-Case Form 10-2 (Revised 1/02/98)

**TITLE III-B**  
**Budget Narrative**  
**2003-2004 Grant Year**

Program Name: Inland Counties Legal Services, Inc.

Budget Prepared By: David Anderson

Personnel

Attorneys: Combined funded and In-kind support includes 1.39 Full Time Equivalent (FTE) attorneys. This will be represented by one 60% FTE attorney in San Bernardino, one 30% FTE attorney in Rancho Cucamonga, one 30% FTE attorney in Victorville, one 4% FTE managing attorney in Rancho Cucamonga, and one 15% managing attorney in Victorville.

Paralegals: Combined funded and In-kind support includes 2.10 FTE paralegals. This will be represented by one 100% FTE paralegal in San Bernardino, one 80% FTE paralegal in Rancho Cucamonga, and one 30% FTE paralegal in Victorville.

Other Staff: Combined funded and In-kind support includes secretarial assistance in San Bernardino, Rancho Cucamonga, and Victorville offices, as needed. Other staffing would include Controller and Full-Charge Bookkeeper time for fiscal management and oversight, and program administration by the Executive Director and Program Coordinator, as needed.

Employee Benefits: Pro-rata portion of payroll taxes, health benefits, pension, and unemployment costs.

Non Personnel

Staff Travel: Amount of costs projected necessary for the above personnel to travel to/from outreach or courthouse locations directly related to this contract.

Staff Training: Amount of costs projected necessary for the required training of the above personnel in the proper discharging of their duties related to this contract.

Consumable Supplies: Amount of projected costs, based upon historical expenses, of consumable supplies (office supplies, printing, postage, etc.) related to this contract for a one year time period.

Insurance: Projected pro-rata costs of malpractice, property, and other insurances for the above individuals as required by this contract.

Space: Projected pro-rata costs of space rental utilized for this contract in San Bernardino, Rancho Cucamonga, and Victorville offices.

TITLE III-B  
Budget Narrative  
2003-2004 Grant Year  
Inland Counties Legal Services, Inc.

Non Personnel (Continued)

Utilities: Projected pro-rata costs of electric, gas, janitorial, and telephone expenses in the San Bernardino, Rancho Cucamonga, and Victorville offices.

Other: Projected pro-rata costs of an annual A-133 financial audit as required by the contract. Other costs would include any pro-rata costs associated with this contract that may arise such as community education advertising, personnel advertising, bank fees directly related to this contract, etc.

**INLAND COUNTIES LEGAL SERVICES****SAN BERNARDINO Title III-B CONTRACT  
2003-2004 WORK PLAN**

**NOTICE:** The Legal Services Corporation (LSC) which provides federal funding to Inland Counties Legal Services (ICLS) requires that any funds received by ICLS, regardless of source, and including Title III-B funds received under this grant, may not be expended for any purpose prohibited by the Legal Services Corporation or Pub. Law 107-77, 115 Stat. 748 (2001) which incorporates by reference the 1998 restrictions contained at Pub. Law 105-119, Sections 501-506. This constitutes the notice required by LSC to be provided to the Department of Aging and Adult Services as a funder.

1. **LEGAL SERVICES UNITS - 6,080** Legal Services Units (1 hour = 1 unit)
2. **CASE PRIORITY AREAS**

As determined by ICLS, selected cases based on legal merit, necessity and client circumstances. ICLS will determine the manner, type and amount of assistance to be provided, e.g. counsel and advice, brief services (negotiations, letters, etc.), transactional services or direct representation before an administrative agency by paralegals under the supervision of an attorney, or in court by licensed attorneys. Such assistance may be delivered in person, by telephone, via a video-conferencing system, in a branch office, or at designated outreach senior centers and other facilities.

A. GOVERNMENT AND PUBLIC BENEFITS

1. Access to Health Care - Eligibility under governmental programs, insurance coverage, alternatives to institutionalization such as home and community based long term care, and home health care for short-term, acute care services through home health agencies.
2. Establish eligibility for various benefits programs to obtain or preserve basic income, including, but not limited to, Temporary Assistance for Needy Families (TANF), Supplemental Security Income (SSI) overpayments and disability, Medi-Cal, including senior nursing home eligibility; Food Stamps, Unemployment Insurance Benefits, General Relief and In-Home Supportive Services cases

B. ELDER LAW CASES

1. Elder Abuse: Physical, emotional and mental abuse as well as caretaker and financial abuse (real property, consumer contracts fraud, misappropriation of seniors' income and assets)
2. Discrimination issues in long term care facilities, facility access, involuntary transfer
3. Powers of attorney obtained under duress; non-probate decedent estates with limited assets (affidavit/death of joint tenant; beneficiary upon death usually to secure the survivor's interest in a residence or mobile home); health insurance contracts
4. Medi-Care and Medi-Cal eligibility
5. Durable powers of attorney for health care
6. Small estate planning, primarily simple will preparation and/or advice, for seniors

C. HOUSING and HOUSING-RELATED ISSUES

1. Senior Housing Issues (subsidized housing)
2. Mobile Home Park issues
3. Evictions from private and public housing
4. Representation in summary eviction "Notice to Vacate" cases
5. Assistance to senior landlords if the rental unit is a significant income source for the senior's daily living needs
6. Assistance in unlawful retention of personal property by landlord
7. Assistance in removal of real property liens against the homes to avoid wrongful foreclosure
8. Limited assistance in real property fraud cases
9. Limited assistance in real property foreclosures (limited)

D. CONSUMER FRAUD

1. Consumer contracts (fraudulent practices, statutory violations or illegal provisions)
2. Unlawful debt collection practices
3. Health insurance contract issues
4. Repossessions, mostly automobile pickups
5. Wage garnishments for debts (includes claim of exemptions for wage and bank accounts)
6. Bankruptcy (limited to special circumstance or need)

E. FAMILY LAW CASES

1. Guardianship actions for court appointment of legal guardian for abandoned, abused or neglected minor children, who do not have a caretaker and who are not in the juvenile justice system (usually grandparent custodial cases)
2. Dissolution of marriage (limited to special circumstances or need)
3. Paternity or dissolution lawsuits to establish child support obligations, determine child custody and visitation rights, and, when needed, in conjunction with domestic violence restraining order
4. Conservatorships to protect primarily seniors from financial or physical abuse or to obtain emergency medical benefits
5. Spousal support
6. Child Support

F. INDIVIDUAL RIGHTS

1. Protective orders in Civil Harassment or Invasion of Privacy cases that are non-fee-generating (or if fee-generating, the policy requiring written rejections by at least two private attorneys is followed)
2. Naturalization cases to establish U.S. citizenship
3. Establishing the legal rights of Physically and Mentally Disabled Persons, to education, employment or housing benefits

G. EMPLOYMENT

1. Wages Claims, including minimum wage violations, refusal to pay wages, unlawful wage deductions
2. Labor Board appeals
3. Job Discrimination and Job Related Benefits (limited)

3. **COMMUNITY EDUCATION/TRAINING UNITS**

**100 Units** (One hour = one unit, includes preparation time and travel)

Presentations to groups of seniors as well as to other providers of services to seniors

4. **NEW SENIORS TO BE SERVED - 1,800**

Assistance to an estimated 1800 new seniors (seniors who have not received services during the grant year of July 1, 2003- June 30, 2004)

5. **ACCESS EFFORTS/PRIORITIES IN SERVICE**

ICLS will make reasonable efforts to provide access to any person age 60 or above who needs service.

Preference will be given to "frail elderly" persons and to seniors in the greatest economic or social need.

***In Greatest Economic and Social Need Considerations***

- Low Income (at or below SSI/SSA level)
- 75 years of age or older
- Racial or ethnic minority
- Non or limited-English speaking
- Lives alone
- Homebound persons
- Disabled persons
- Chronic ill (physical or mental)
- Confused persons
- Socially isolated
- Functionally impaired seniors who are unable to perform one or more activities of daily living
- No informal support system to serve the client's needs or an existing informal support system which needs additional resources



6. **ICLS OFFICES/STAFFING**

ICLS will provide legal services at its San Bernardino, Rancho Cucamonga and Victorville Offices. Staffing will be at the level indicated in the attached proposed budget with Title III-B funds and in-kind support. In-kind support is shown on budget only for advocate positions; other support given is secretarial.

|                         |                        |      |
|-------------------------|------------------------|------|
| <u>San Bernardino</u>   | one attorney position  | 60%  |
|                         | one paralegal position | 100% |
| <u>Rancho Cucamonga</u> | one attorney position  | 30%  |
|                         | one paralegal position | 80%  |
|                         | managing attorney      | 4%   |
| <u>Victorville</u>      | one attorney position  | 30%  |
|                         | one paralegal position | 30%  |
|                         | managing attorney      | 15%  |

7. **Client Outreach Schedule**

Outreach shall be provided by each ICLS Branch Office as noted below, subject to any modifications approved by the Department of Aging and Adult Services. Outreach to be provided by each ICLS Branch Office as follows:

**SAN BERNARDINO OFFICE**

715 N. Arrowhead Avenue, Ste. 113, San Bernardino 92401

- Redlands Community Senior Center  
1<sup>st</sup> Thursday of month from 9:00 a.m. - Noon
- Scherer Senior Center in Yucaipa  
3rd Wednesday of month from 8:30 a.m. to 3:00 p.m.
- Twentynine Palms Senior Center  
4th Wednesday of the month from 8:30 a.m. to 11:30 a.m.
- Joshua Tree Senior Center  
4th Wednesday of the month from 12:30 p.m. to 3:00 p.m.
- Yucca Valley Senior Center  
4th Thursday of the month from all day

**RANCHO CUCAMONGA OFFICE**

10601 Civic Center Drive, Ste. 260, Rancho Cucamonga 91730

- Montclair Community Center  
2nd Thursday of each month 9:00 a.m. - 1:00 p.m.
- Ontario Senior Citizens Center  
1st Monday of each month from 9:00 a.m. - 1:00 p.m.
- Rialto Senior Center  
4th Thursday of each month from 9:00 a.m. - 3:30 p.m.

- Josephine Knopf Senior Center  
2nd Monday of each month 9:00 a.m. - Noon
- Steelworkers Oldtimers Foundation  
3rd Thursday of each month 9:00 a.m. - 3:30 p.m.
- Upland Senior Center  
3rd Monday of each month 9:00 a.m. - 3:30 p.m.

#### **VICTORVILLE OFFICE**

14196 Amargosa Road, Ste. K, Victorville, Ca 92392

- Barstow Senior Center  
1st Tuesday of each month (3<sup>rd</sup> Tuesday when 1<sup>st</sup> Tuesday is Holiday)
- Needles Courthouse  
Quarterly (March, June, September and December on the 2nd or 3rd week of the month)  
for a two-day period<sup>1</sup>
- Big River Senior Center  
3<sup>rd</sup> day of the quarter following the Needles Outreach on an "as needed" basis
- Trona and Baker (as needed about 3 times a year when called by senior center staff)
- Big Bear - St. Columbus Episcopal Church  
2<sup>nd</sup> Tuesday monthly
- Barstow Veterans Home (as needed)  
3<sup>rd</sup> Tuesday of month
- Lucerne Valley Domestic Violence Outreach Center  
4<sup>th</sup> Thursday of month

#### **8. ICLS/Long Term Care Ombudsman**

ICLS and the Long Term Care Ombudsman Program of the Department of Aging and Adult Services have a written agreement to specify ways in which both programs will coordinate advocacy efforts and ways in which ICLS will provide backup support to the Office of the Ombudsman.

#### **9. ICLS Collaborations:**

ICLS will continue to coordinate with other providers of service to seniors in the county, including the Senior Information and Assistance Program of the Department of Aging and Adult Services, senior center directors and staff, law enforcement personnel, etc.

#### **10. Private Bar Involvement (PAI) Efforts**

ICLS shall continue its efforts to coordinate community education events involving private attorneys.

**11. Donations Policy**

ICLS will continue the donation policy approved by the Department of Aging and Adult Services and shall record all donations as project income. The policy protects the confidentiality of the donor and is solicited only after ICLS has committed to provide the services. Every donor is given a receipt.

**12. New Funding Sources:**

ICLS will make reasonable efforts to develop and attract new funding sources to provide legal services for senior citizens.